

Gradience™ Handbook Manager

User Manual



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Welcome!

Congratulations! You are about to eliminate one of the biggest obstacles businesses face — communicating and establishing company policies and procedures for employees.

Gradience Handbook Manager simplifies creating, editing and publishing a custom policy manual. Quick and easy, Handbook Manager helps you explain your company's goals, define employee responsibilities and prevent serious legal issues from affecting business. With state-specific policies that the Gradience Legal Team has carefully reviewed, you will no longer have to guess about what is required and what is optional.

All it takes is five easy steps to create your handbook:

- Step 1 – Set Up Handbook**
- Step 2 – Select Policies**
- Step 3 – Edit Policies**
- Step 4 – Edit Inserts**
- Step 5 – View/Publish**

Gradience Handbook Manager tracks handbook and policy versions, as well as lets you set a password to control access to the program. Best of all, there is no limit to the number of handbooks you can make or revise.

Because state and federal laws are always changing, you will want to keep up-to-date with Gradience policy updates so that your handbook serves as an ongoing, ***living*** document. Gradience Handbook Manager is the easy way to keep your handbook information current. With Gradience Handbook Manager, you are able to quickly and efficiently notify employees in writing about the latest changes to your company policy.

Let's get started on your employee handbook!

Gradience Handbook Manager - New Features

AutoUpdate

The auto update function is designed to easily update existing applications to the latest version of those applications. Users no longer have to concern themselves with downloading and installing updates to Gradience software. The update system handles all updates automatically, making it practically seamless to update to the latest version.

Note: Updates versus Upgrades Updates (also called minor updates) are updates where the first version number has not changed. For example, if you purchase a Gradience product with version 2.x.x., you can upgrade to any other version 2.x.x free of charge. Upgrades (also called major upgrades) are indicated by a change in the first version number. For example, when Gradience improves to the next higher first version number (from 5.x.x to 6.0.0), this is called a major upgrade. Major upgrades usually have a significant amount of new features and software improvements which warrant an additional charge. Most upgrades require an upgrade fee. When Gradience performs an AutoUpdate, the fixes applied are minor updates, and are available free of charge. Contact Gradience sales for more information on how to purchase major upgrades.

ComplyRight™ SmartUpdate

Never be out of compliance again!

With the new ComplyRight SmartUpdate system, Handbook Manager automatically downloads and applies compliance updates to your existing applications. Programs using the SmartUpdate system remain compliant with the latest changes in laws and regulation as soon as they are available on the ComplyRight SmartUpdate system. Users can rest assured that SmartUpdate content is correct because it's certified by the ComplyRight team.

Updated Policies

Many policies have been updated in this version of Gradience Handbook Manager! You can see the changes by visiting the [Handbook - New Policies](#) topic.

Handbook System Requirements

Minimum

Windows XP Home (SP2), Windows XP Professional (SP2), Windows 2000 Professional

Pentium III or Higher Processor

128 MB available RAM (Random Access Memory)

30 MB available hard disk space

Access to a CD-ROM drive

SVGA monitor with 800 x 600, 16-bit color depth or higher

Recommended

Windows XP Professional (SP2), Windows 2000 Professional, Windows 2003 Server

Pentium IV or Higher Processor

512 MB available RAM (Random Access Memory)

60 MB available hard disk space CD-ROM drive

SVGA monitor with 1024 x 768, High Color or higher

Windows-compatible graphics quality printer

Installing Handbook Manager

Here is a fast and easy guide to installing the program:

1. Close all programs running on your PC.
2. Insert the Handbook Manager CD-ROM into your computer's CD drive. Within moments, the installation menu will appear. If the installation menu does not appear, click Start, Run, and enter **D:\Setup.exe** where D: is the letter of your CD ROM drive.
3. Click **OK** or press **Enter**.
4. Select Install Handbook Manager. This will begin the installation process.
5. Enter your Product Key or type DEMO in the field. Your **Product Key** is located inside the QuickStart guide. Click **Next** to continue.
6. Click "**Yes**" if you agree with the Software License Agreement to continue installing. (If you click "**No**", this will end installation process.)

After installation is complete, click **Finish**. The Gradience program group will be added to your Start menu and the Gradience Handbook Manager icon will now appear on your desktop.

Double-click the icon to launch the program. You're ready to start creating your own company handbook!

Unlocking the Demo

You can unlock your demo copy after a new installation, or after you have already installed the program.

New Installation

You can unlock your installation immediately, or run any Gradience application in Demo mode. Here's how:

- During the installation of any Gradience application, you will be prompted to enter your license key in the Product Key window.
- Enter the key in the Key field if you have it, or click Next to continue installing the application to run Gradience in Demo mode.
- After running the applications in Demo mode, you will periodically be reminded of the Demo trial period remaining and given the option to purchase.

Previous Installation

If you have already installed the demo of Gradience Handbook Manager you can unlock it by following the steps listed here.

- Open Gradience Handbook Manager
- Select **Enter Product Key Code** from the Help menu.
- Enter the Product Key you received with your purchase. This will be located inside of the **QuickStart Guide** and/or sent to your e-mail address
- Click OK. If the confirmation message does not appear, verify that you entered the correct key. The Product Key is not case sensitive.

Note: There is a different product key for each Gradience product.

Installing from a Web site download

If your CD-ROM is lost or damaged, you can always visit our Web site and download the Handbook Manager program and install it. Here's how:

1. Open your Web browser (e.g., Internet Explorer) and go to <http://www.gradiencesupport.com>. Click on **Download the Latest Version of Our Software**, select Handbook Manager. Click the Download link. When the download dialog box appears, save the file to your desktop or a preferred location.
2. Upon completion of the download process, close all programs running on your PC.
3. Locate the Gradience Handbook Manager Install file and double-click to begin the installation process.

Follow the prompts to install your software.

After the installation is complete, the Gradience program group will be added to your Start menu and the Gradience Handbook Manager will appear on your desktop.

Caution!

We recommend that you do not select **Open** when downloading, as this will not save the file to your computer.

Getting Started

Okay! You're ready to start making your first handbook! Double-click on the Gradience Handbook Manager icon to launch the program. The Welcome Screen and Message are displayed.

The Disclaimer screen is displayed. Click I Agree, if you agree to the disclaimer, to continue.

Opening the program for the first time will take you directly to [Step 1 - Set Up Handbook](#).

The second time you enter the program you will see the "Create / Open" Handbook popup.

STEP 1 - Set Up Handbook

Here you input information about your company so that the program can recommend specific state and federal policies that may apply to your company. Fill in all fields with the appropriate information. When finished, click to move forward to Step 2. To move forward to the next step, you must have all fields completed.

Note

Press **Esc** (Escape) key to cancel changes on this screen.

STEP 2 - Select Policies

In Step 2, you'll find policies we recommend and have a chance to choose additional policies and order your handbook.

As you scroll down the categories and subcategories, click the checkboxes next to those policies you wish to add to your handbook. A check will appear in the box next to the policy.

You can also click on a policy category or title and drag it to a different place. Do this to order and organize your handbook differently than the default settings.

Circled S

Denotes State specific requirements.

Check Mark

Denotes recommended policies.

Collapse List

Click here for a quick view of headings.

Expand List

Click here for a comprehensive list of all categories and policies.

"Show Only"

Click here to display only those policies you choose; unclick it to review the entire list of policies.

[Next Step](#)

STEP 3 - Edit Policies

In Step 3, you'll find the list of categories and policies you've created from the previous screen. Here you can edit the policies, making them specific to your company. When you select a policy, the text is displayed at the right, as well as any notes concerning the policy. Clicking on the respective Edit buttons allow you to revise the policy or notes text.

Click **EDIT POLICY** to change or format policy.

You will see a warning sign that urges you not to delete Insert Text Fields. An Insert Field **<****Insert****>** is text that will be filled in [Step 4](#). These Fields allow you to personalize policy text, much like merge fields in a word processing program.

Click **EDIT NOTES** to type in notes about a policy. For example, you might want to remember why you changed or added a policy at your company. You'll find Gradience Legal Team notes here, too.

When you click on Edit Policy or Edit Notes, the Edit screen will pop up. This Screen functions much like a word processor.

Note

Text in the notes field will not print out in your handbook.

STEP 4 - Edit Inserts

Here you can fine-tune your handbook. This is the final editing step for policies that need personalized company information:

As you scroll down the highlighted policies on the left, you will see the needed Inserts at right.

Expand List

Click here for a comprehensive list of all categories and policies.

Collapse List

Click here for a quick view of headings.

Edit Inserts

Allows you to fine edit the Insert Field.

Previous Insert

Moves you to previous Insert Field.

Next Insert

Moves you to next Insert Field.

Note

If you need to edit policies, you can always go back to [Step 3](#).

<**INSERT****>** is a placeholder informing you that you need to enter text to make it specific to your company.

Once you've entered the information in the appropriate field, it appears throughout your handbook. It's accurate and saves you time. Also, if an Insert changes, you only need to apply it once to your handbook.

Simply fill in the needed Insert or click the Edit Insert button to have a full Edit screen pop up. You must edit all fields in red before continuing to the final step.

Incomplete Insert Fields have a pencil beside them and appear in red.

STEP 5 - View / Publish

You made it! Step 5 allows you to view and publish your handbook. Here are some of the functions moving you closer to publication:

Review your employee handbook. If you want to make changes, just go to the appropriate steps using the **Previous** or **Next Step** buttons. You may also use the Step 1 - 5 buttons at the top. If you're ready to print, click **Page Settings** to specify how you want the document to look:

Page Setting Button

Lets you set page size, header/footer and table of contents options.

Publish Button

Changes the handbook status from draft to published and puts a time/date stamp and version on it.

Print Button

Sends your handbook to the printer.

From the Page Settings screen, click **Page Layout** to view the overall spatial look of the page, how to set margins, and whether the page is portrait or landscape.

Page Layout

Allows you to set the page portrait or landscape

Header / Footer

Allows you to add Headers or Footers

Table of Contents

Gives options for table of contents

Width

Sets the width of page

Height

Sets the height of page

Margins

Sets the white margins on the left, right, top and bottom

Orientation

Set page in portrait or landscape

When you click **Header/Footer** you will have the following options:

Header/Footer

Allows you to select Header or Footer text

Page Selection

Allows you to set separate odd or even headers and footers

Insert Calculated Text

Allows you to include page numbers, total pages, date, and time

Click the Publish button to accept your final draft. A popup will appear to confirm that you want to set the date, time and version for this handbook.

Click Print to send your created work to the printer.

Update Old Policies

The **Update Old Policies** feature, located under **Maintenance** in the **File Menu**, will update the current handbook with selected new and revised policies. **Note:** The updated policies will not be available for existing handbooks UNLESS you run the Update feature. They will be available when creating a new handbook.

The following describes the **Update Old Policies** feature:

Add/Update

This adds the selected policies to the current handbook's available policy list. The available policy list is a list of all policies that you may select from.

Include in Handbook

This allows the selected policy to be included into the current handbook. This column will be automatically checked if the selected policy is already a part of your handbook.

Policy

This is the name of the policy. The policy name may have changed if the Reason column says Update. Review the Old Policy and New Policy names.

Reason

The reason for the update can either be Update or New Policy. Update signifies policies that are in the current handbook and have been revised with updated material. New Policy signifies that this policy is a new addition to the core Handbook Manager policies.

Old Policy

This displays the current (unchanged) policy. Clicking Print Old will allow you to send the policy to the printer for your review.

New Policy

This displays the new policy. It may be a good idea to print both the Old and New Policies for review before making any changes.

OK

Clicking **OK** makes the necessary changes from the selected options. Changes cannot be undone. We recommend leaving the default check marked policies selected when clicking **OK**.

Cancel

Clicking **Cancel** does not save any changes. You may go back to the Update Old Policies screen by going to **File > Maintenance > Update Old Policies** from Step 1.

Font Change Utility

If you have a handbook that was created in Version 1, you may have experienced some text overlapping. The default font in Version 1 was MS Sans Serif which is not a True Type font. We have found that using non True Type Fonts may cause the above issue for some printers.

The Font Change Utility changes fonts with the font type MS Sans Serif to Arial. In most cases, this corrects the overlapping text issue.

Contacting Technical Support

Technical Support for Gradience Handbook Manager is available as follows:

Internet: <http://www.gradiencesupport.com>

Phone Requests: 888-925-7740 (8:30 a.m. to 6:00 p.m., EST, Monday-Friday)

What's That Mean?

Here's a quick reference to mastering **Gradience Handbook Manager** terms.

Insert Fields or <**INSERTS****>** – Appear on a screen as a red highlighted fill-in-the-blank requests where you type and edit information that personalizes policies in your handbook.

Published vs. Unpublished - Published means you're ready to print a final draft and that you want to "stamp" the handbook with a date and version. Unpublished means you're still working on the handbook and haven't distributed it to employees yet.

Product Key Code - Also known as the "unlock code", this is a 14 digit alphanumeric code printed in the lower right hand corner of the first page of the user's guide. When entered, it enables you to use all functions of the program.

Demo Mode - If you do not input the Product Key Code at installation, the program will function in a Demo Mode, and the print feature will be disabled.

Web site download - This is another option to reinstalling your program in case the CD-ROM is lost or damaged.

Handbook - New Policies

This version of **Gradience Handbook Manager** contains many updated policies. Only state-specific policies were updated if required for compliance with state law changes. Most of the changes are in the smoking and military leave policies as many states enacted smoke free laws this year and extended rights for employees in the military. The list below contains all the state specific policies and policies which were updated with new laws:

Updated Policies 2006 - Handbook

- **Breaks policies** (existing state-specific policies were updated if needed to comply with state law changes)
- Rhode Island policy was updated to comply with new law.
- **Overtime policies** (existing state-specific policies were updated if needed to comply with state law changes)
- **Jury duty policies** (existing state-specific policies were updated if needed to comply with state law changes)
- Arizona policy was updated to comply with new law.
- Florida policy was updated to comply with new law.
- Indiana policy was updated to comply with new law.
- **Time off to vote policies** (existing state-specific policies were updated if needed to comply with state law changes)
- Alabama policy was updated to comply with new law.
- **Military leave policies** (existing state-specific policies were updated if needed to comply with state law changes)
- Connecticut policy was updated to comply with new law.
- Delaware policy was updated to comply with new law.
- Iowa policy was updated to comply with new law.
- **Policies prohibiting harassment and discrimination** (existing state-specific policies were updated if needed to comply with state law changes)
- **Time off work in connection with court cases policies** (existing state-specific policies were updated if needed to comply with state law changes)
- **Termination, resignation and discharge policies** (existing state-specific polices were updated if needed to comply with state law changes)
- State specific polices were updated to include state laws on when employees must receive their final paychecks upon separation from employment.
- **Paid time off policies** (existing state-specific polices were updated if needed to comply with state law changes)
- **Vacation pay policies** (existing state-specific polices were updated if needed to comply with state law changes)
- **State law leave rights policies** (existing state-specific policies were updated if needed to comply with state law changes)
- **Smoking policies** (existing state-specific polices were updated if needed to comply with state law changes)
- Arkansas policy was updated to comply with new law.
- Georgia policy was updated to comply with new law.
- Delaware policy was updated to comply with new law.
- Louisiana policy was updated to comply with new law.
- Maine policy was updated to comply with new law.
- Maryland policy was updated to comply with new law.
- Minnesota policy was updated to comply with new law.

- **Employee records policies** (existing state-specific policies were updated if needed to comply with state law changes)

Frequently Asked Questions

Q: What do I do when I'm totally stumped?

A: Contact Gradience Tech Support:

<http://www.gradiencesupport.com>

(Monday - Friday, 8:30 AM - 6:00 PM EST)

(888) 925-7740

Q: How do I create a new Category?

A: From **Edit > Categories > Create New Categories** while on [Step 2 - Select Policies](#)

Q: What does the circled S stand for?

A: It's a State Recommended Policy

Q: What is the difference between Edit Policy and Edit Insert?

A: Edit Policy - Allows you to change the policy to make it specific to your company.

Edit Insert - Allows you to change text within <****INSERT****> fields. This data will be merged on [Step 5 - View/Publish](#).

Q: Why don't my Notes show up when I print the Handbook?

A: A Note is a memo specific to that policy. For example, "Created No Smoking Policy on 2/14/2002" may be helpful reference information but not necessarily text you wish printed within the handbook.

Q: How do I insert a header or footer into my Handbook?

A: From [Step 5 - View/Publish](#) go to Page Settings, and then click on **Header/Footer**.

Q: What does Publish do?

A: Publish sets the date/time stamp and version number of the handbooks. This designates that the handbook is ready for printing and distribution.